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Lawn&Garden Marketing™

SEPTEMBER 1988

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Cover story: Lawn & garden DIY videos

Expo review • OPE buyer demographics

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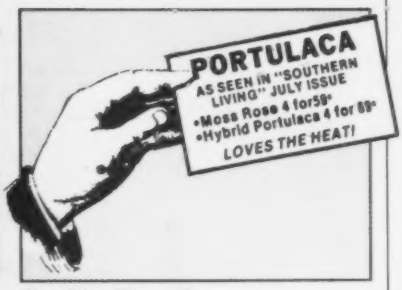
Lawn&Garden Marketing™

The merchandising magazine for lawn, garden and leisure living products.

DIY videos, 6

Worth a Look, 12



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Did you know?

When asked in a survey to name the best plant food type among three choices, 33.7 percent of respondents named controlled-release, 29.9 percent named continuous feeding and 29.9 percent named timed-release feeding, 6.4 percent gave no answer.

Source: *Better Homes and Gardens* consumer panel, September 1987

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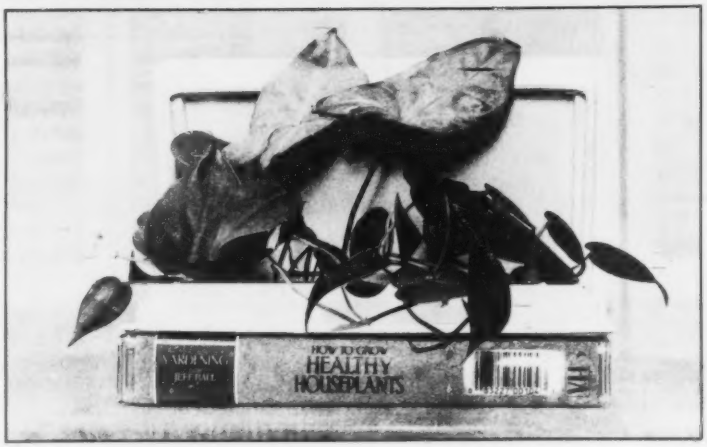
From the Editor



In a Roper Organization study comparing 20 hobbies, forms of relaxation and other personal interests, VCRs topped the "most favorite" list.

In my July column, I described to you how hobbies, such as VCR watching, actually compete for your sales dollar because consumers who are watching VCRs are not participating in lawn and garden activities, and those who are planning a VCR purchase may not buy lawn and garden supplies from you. Now, I want to tell you how you can turn VCR watching to your advantage.

On pages 6-8 of this issue, we feature information about DIY lawn and garden videos available through retail. DIY videos, one of the newest and certainly most entertaining forms of education, bring into your customer's home subject matter of interest to him—at a time that is most convenient to him. To date, about eight video suppliers offer nearly three dozen lawn and garden titles.

Results from a 1988 *LGM* study show that presently only 15 percent of lawn and garden retailers stock DIY lawn and garden videos for retail sales. Yet, nearly 48 percent indicate they are considering carrying them in the future. I believe industry retailers should seriously consider selling DIY videos because videos help educate the customer without tying up salespeople, compensate for untrained employees and, best of all, provide sales profit.

The potential for sales is certainly in your favor. According to the Electronic Industries Assn., some 75 million prerecorded video cassettes were sold in 1986; 1987 produced even greater sales, because the number of U.S. households owning VCRs increased to nearly 50 percent, and videotape prices decreased, making them more appealing to own. As of June 1987, 36 percent of all U.S. households had purchased prerecorded video cassettes.

From an educational standpoint, the value of viewing videos, combined with in-store assistance (and possibly a DIY book), clearly is tremendous. Statistics reveal that if you only explain information to someone, in 72 hours he will retain only 10 percent of that information. If you show him by example, he will retain 25 percent of it. But if you show him and tell him, he will retain 70 percent of it. Therefore, the best way to provide lasting lawn and garden advice to your customer is through the availability of a video.

But even if you don't want to sell the product line, I think you can benefit from simply knowing what titles are available and where they can be obtained. For example, check nearby video rental stores to find out what lawn and garden DIY videos they stock. Then, in your store, reference the titles and availability near appropriate merchandise with tags saying "For more information on...."

Or, why not with every $50 purchase of plant materials, give customers a certificate for a free rental of the appropriate L&G cassette at the local video store. Maybe the local video dealer could even put your endorsement next to the DIY lawn and garden category: "As recommended by Acme Garden Center."

What better way to convince your customer that you really care about the success of his lawn and garden venture than to *show* him as well as *tell* him?

Susan L. Anderson

Lawn&Garden Marketing

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Feedback

Compiled by Gina Kellogg Hogan, *associate editor*

DIY videos are still such a novel idea in the lawn and garden industry that many retailers are unfamiliar with the product. But those who are familiar note how helpful and interesting videos can be to their business.

Of the respondents to the June 1988 *Lawn & Garden Marketing* survey on DIY videos, just under 15 percent presently carry the product. But of those who do not, half said they are interested and are considering carrying the line.

Of those already "in the know" about DIY videos, some say they carry videos to help consumers accomplish lawn and garden tasks more easily on their own. Others carry videos that they lend to their customers to help them better understand how properly to use the equipment. Others use the videos to help their employees get a better understanding of what the industry is all about.

One hardware store retailer in New York said that videos increase his store's sales of L&G products. Others noted the educational benefits of the products. A power equipment dealer in Marina Del Ray, Calif., said, "We can show the proper operating and maintenance of equipment" through selling videos. A garden center retailer in Gadsden, Ala., sells the videos for the same reason, "to help people learn these things," he said. And yet another garden center respondent from Dayton, Ohio, said he stocks the videos as a consumer benefit. "They are loaned for free," he explained. A multi-department store retailer in New York, N.Y., said simply, "They sell well."

For those retailers who may be interested in getting in the business of carrying videos, these respondents had some suggestions:

- Place them up front. Keep them visible. They have done well for us.
- Buy on approval only. Some are poorly scripted and contain obsolete, incorrect methods.
- Playing the videos would help. For me, they are a slow sale.
- Preview all videos and make sure the products suggested in them are or can be included in your line.

Other retailers who are interested in carrying the lines evidently recognize the value of selling videos, for the reasons they give for considering carrying the lines echo the comments of retailers who already sell them.

- Customer convenience and impulse reactions.
- Possible sales opportunities and profits.
- Gets customers' attention. Holds them in the store longer. Adds sales.
- It helps sell the products and explains in detail in a shorter period of time than a salesman could allow himself to give.
- To have another way of helping our customers.
- To better inform the public without tying up salespeople.
- To compensate for untrained employees and for (the industry's) image.
- Customers can learn complex skills on their own time, instead of taking much of our time answering questions, though we welcome questions.

Most of the respondents who sold videos have only been involved with the product line for less than two years. The most commonly sold videos, according to our respondents, were from Ortho Consumer Products, San Francisco, and the "Yardening" series from Kartes Video, Indianapolis.

Other videos that were mentioned by respondents were Hometime Videos, Eden Prairie, Minn.; "The Victory Garden" from Crown Publishers, Avenel, N.J.; "John Deere Safety Programs" from Deere & Co., Moline, Ill.; "Foolproof Flowerbeds" from Better Homes and Gardens Video Library, Des Moines, Iowa; the "Joy of Gardening" series from Magic Video, St. Louis; and "Square Foot Gardening" from Sterling Video Group, Bristol, R.I.

Most of the respondents said they play the videos during shopping hours and typically mark them up 25-39 percent; prices ranged from $9.95 to $29.95. The most commonly referred to source of competitor was the discounter or other discounters.

The National Hardware Show, which takes place each August in Chicago, and the International Lawn, Garden & Power Equipment Expo, in Louisville, Ky., in July, were the two most-mentioned tradeshows where respondents said they look for videos. Also mentioned was the National Home Center Show, also in Chicago.

Most admit that the videos are impulse purchases, although they do suggest the videos to their customers. One age group does not seem to dominate, and the videos seem to be of equal interest to both men and women.

As for why more retailers don't carry the products, most of our respondents said that their customers had not requested the product, or that they did not know enough about the products to carry them. However, with the growing interest in videos over the last few years, and the number of new videos presently being introduced (see DIY Videos, page 6), that aspect will no doubt soon change. —LGM

DIY videos

Retailers who sell lawn and garden DIY videos:

Business category	Percentage
Hardware store	21.3
Home center	10.6
Independent garden center	34
Multi-department store	6.4
Power equipment dealer	27.7

Source: *Lawn & Garden Marketing* June 1988 survey.

Retail Marketplace

Safer expands distribution network

Safer Inc., Wellesley, Mass., has contracted for the services of two distribution plants to make customer service to the East and West Coasts easier.

The West Coast facility, Ontario, Calif., serves Washington, Oregon, Montana, Idaho, California, Nevada, Utah, Arizona, Alaska and Hawaii and cuts shipping time to these states by as much as seven days.

The East Coast facility, Camp Hill, Pa., helps Safer deliver products to customers in the territories it serves within three days of order. These territories include New England, New York, New Jersey, Pennsylvania, Maryland, Ohio, Virginia and West Virginia.

In other news from Safer, Timothy R. Zink has been appointed vice president of the newly formed commercial and agricultural division. Zink will be responsible for all marketing and sales operations for commercial products for the arbor, lawn care and nursery industries and agricultural products for edible crops.

Applications being accepted for Green Medal Awards

Past National Gardening grant recipients whose programs are still growing gardens with children are eligible to apply for the National Gardening Assn.'s Green Medal Awards. Ten Green Medal Awards, valued at $1,000, are presented annually to 10 of the best previous grant recipients with proven creative educational programming, community support and long-term sustainability.

The awards consist of garden carts from Agri-Fab, Sullivan, Ill.; videos from Brooklyn Botanic Garden, Brooklyn, N.Y.; hose couplers and kits from Gardena Inc., Minnetonka, Minn.; watering systems from GardenAmerica Corp., Carson City, Nev.; composters from Gardener's Supply Co., Burlington, Vt.; hose from Harvard Industries, Worthington, Ohio; cultivators and shredders from Mantis Mfg., Huntingdon Valley, Pa.; and fruit trees from Stark Bros. Nurseries, Louisiana, Mo.

The first Awards, presented last year, benefitted 16,600 youths.

Home pesticide concerns to be addressed at convention

The safe handling and use of pesticides in the home, in a program titled "Are You Spraying More Than Bugs?," will be presented during the 76th National Safety Council Congress & Exposition to be held Oct. 16-20 in Orlando, Fla.

The program, developed by the Council's Home Safety Division, will address the reality that, while the industry has many restrictions on the transport, storage, use and disposal of pesticides, few apply to home-owners.

Susan Whitney, pesticide education specialist of the Institute of Food & Agricultural Services, University of Florida, Gainesville, Fla., will be the featured speaker.

L&G spending at discounters

Average household spending on garden supplies in discount stores ranked 15th out of 33 categories measured. Total average spending at discounters in 1987 was $840.65.

Ranking	Category	$ Spent
1	Women's wear	$ 100.46
5	Linens/domestics	52.20
10	Shoes	26.41
15	Garden supplies	21.27
20	Jewelry/watches	16.81
25	Handbags/accessories	9.83
30	Pet supplies	4.37

Source: June 1988 *Discount Merchandiser*

Fiskars unifies worldwide consumer business

Wayne G. Fethke, president, Fiskars Mfg. Corp., Wausau, Wis., has been named to head the newly restructured worldwide operations for Fiskars Consumer Products Group.

Until now, the Consumer Products Group had been divided into three separate units: Consumer Products Group USA, Consumer Products Group Pacific Rim—both headed by Fethke; and Consumer Products Group Europe. The new structure unifies the three units into one worldwide group headed by Fethke.

Briefs

• A 30-min. VHS color video titled "Landscape Irrigation Maintenance & Troubleshooting" has been released by the **California Landscape Contractors Assn.** The tape features step-by-step guidelines for installing and maintaining landscape irrigation systems. It was developed for industry training and classroom instruction.

• Two sales representatives have been appointed to **Ball Seed Co.**, West Chicago, Ill. Andrew Brown will service growers throughout central Pennsylvania, and Swayne Schilling will be responsible for accounts in western North Carolina.

• Michael Kennedy has been appointed director of marketing for the **Sudbury Lawn and Garden Products Division** of Farnam Co. Inc., Phoenix, Az.

• BPI, The Professional Plant Growers Assn., has a new headquarters in Lansing, Mich. The new mailing address is P.O. Box 27517, Lansing, MI 48909.

• **Anchor Swan,** Worthington, Ohio, promoted three executives to new positions during a recent restructuring. Norman Crawford has been named vice president, consumer and industrial products; James F. Powell has been promoted to vice president of sales, consumer products; and James R. Sayers has been appointed director of marketing for consumer and industrial products.

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OPEI study defines consumer demographics

Each week, the OPEI calls thousands of households to ask them when and where they made their most recent power equipment purchase. Their responses can help retailers better define their business strategies.

Being in tune with the market is a smart way for retailers to get the jump on competitors who do not take a serious look at demographics. Retailers who keep up with the most recent demographics of OPE buyers have a better chance at servicing sales.

In an effort to help the industry learn more about its consumers and the retail market, the Outdoor Power Equipment Institute and its members are conducting an on-going research program designed to track U.S. sales of walk-behind and riding mowers, lawn and garden tractors, snowblowers, tillers and engines.

Results of this new OPEI Retail Sales Program include four key areas that can directly affect business activities and profits.

In sales by retail channel, both lawn and garden centers and OPE dealers account for smaller percentages of walk-behind mower sales: lawn and garden centers account for 12 percent of sales of walk-behinds, with OPE dealers having only a 3 percent share. Hardware stores have a somewhat stronger position, with a 17 percent share.

However, when you look at the more expensive products, such as riding mowers and lawn and garden tractors, a different picture emerges, as both OPE dealers and L&G outlets have a considerably higher market share. Looking at the sales of lawn and garden tractors, OPE dealers have a 13 percent share, and lawn and garden centers have a 15 percent share. This increase can be found in riding mower sales, also. OPE dealers have an 11 percent retail market share, and lawn and garden centers have 26 percent share. But hardware stores experience a decrease in sales of these products, as they hold an 8 percent share of lawn and garden tractor sales and an 11 percent share of riding mower sales.

Such substantial increases in the market shares of OPE dealers and L&G outlets—as well as the decreases in shares among hardware stores—should alert retailers to the trends of buyers, and changes in sales strategies should be made, if necessary.

Furthermore, retail market shares of snowblowers are 6 percent for OPE dealers, 18 percent for lawn and garden centers, and 22 percent for hardware stores, and shares for walk-behind tillers are 8 percent for OPE dealers, 14 percent for lawn and garden dealers, and 13 percent for hardware stores.

In pricing by retail channel, data show that lawn and garden centers and OPE dealers sell at a higher average price than any other group. For instance, national retailers sell walk-behind mowers for an average of $263, while OPE dealers sell them for an average of $304 and lawn and garden centers for an average of $363. Hardware stores also sell walk-behinds at a higher average price of $309. Lawn tractors go for an average of $1,256 at national retailer outlets, for an average of $2,484 at OPE outlets and an average of $2,146 at lawn and garden centers.

continued...

Demographics...*continued*

However, the average price of these tractors at hardware stores is only $1,185. These prices should make retailers realize the quality and services customers in each outlet expect.

Results of the study's consumer profile include data eliminating some stereotypes and preconceived notions about "who buys outdoor power equipment."

For instance, according to the study, the typical buyer is not necessarily male. Seventeen percent of walk-behind mower buyers are female, and an additional 15 percent are female buyers accompanied by males. Females also account for 12 percent of snowthrower purchases, as well as 12 percent of tiller purchases. And when accompanied by males, females are involved in 14 percent of snowthrower purchases and 15 percent of tiller purchases.

It is clear by these results that any retailer who does not have a sales pitch directed to women is simply ignoring a large group of potential buyers, and thereby losing sales.

continued...

How the retail outlets are defined

Nine classes of retail outlets are included in OPEI's Retail Sales Program data. In the continuing survey, consumers are asked, "In what store was the (specific OPE item) purchased?" If the respondent answers Sears, J.C. Penney, Montgomery Ward, K mart, Wal-Mart, Western Auto or Lowes, no further questions are asked. If an outlet other than the above is mentioned, the consumer is read a list of outlet types and asked to indicate the one that describes the specific outlet. No definitions of outlet types are read to the consumer.

For the purpose of understanding the data from this program, however, OPEI gives the following definitions:

National retailer: The following retailers only are in this category: Sears, J.C. Penney, Montgomery Ward and Western Auto.

Discount store: Includes K mart, Wal-Mart and other departmentalized retail establishments with self-service hardgoods, health and beauty aids, apparel and other softgoods departments.

Department store: Departmentalized retail establishments carrying a general line of apparel, home furnishings and housewares.

Lawn and garden center: A retail establishment primarily carrying lawn and garden supplies and tools, such as fertilizer, lawn sprinklers, nursery stock, seeds and bulbs, and outdoor power equipment.

Hardware store: Retail establishments primarily carrying a number of basic hardware lines, such as hand tools, power tools, builders' hardware, paint and glass, housewares, and household appliances and cutlery.

Home center: Includes Lowes and similar establishments that specialize primarily in home improvement items, lumber and related materials.

OPE dealer: A retail establishment primarily carrying outdoor power equipment. Also, includes farm equipment stores.

Farm supply store: A retail establishment primarily carrying farm supplies, such as fertilizer, livestock feed, seeds and related materials.

Other: Includes rental/appliance/auto/motorcycle/bicycle/marine dealer, TV shopping show, mail order and any other purchase not fitting the above categories.

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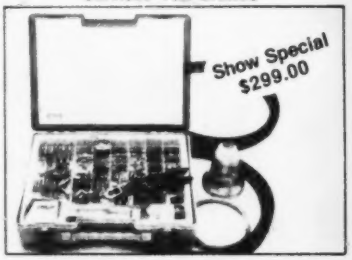

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Demographics...*continued*

The age of buyers also is a factor worth considering. The data of this study shows that buyers of riding mowers and tractors have the oldest median age, 42, and walk-behind mower purchasers have the youngest median age, 39. Both snowblower and tiller buyers have a median age of 40.

The household median annual income for outdoor power equipment buyers ranges from about $37,000 to $50,000. These statistics also should be taken into account when planning advertising strategies and how to make products appeal to customers.

Another comparison made in the study was between first-time and replacement buyers. Experienced buyers were found to pay from 12 to 51 percent more, which indicates that the replacement buyer purchases a more upgraded product with upgraded features.

The fourth area covered in the study was geographic sales patterns. The data show that sales of lawn and garden products generally reflect the population distribution in the United States. The top five regions are the East North Central, South Atlantic, Mid-Atlantic, Southwest and Pacific. However, as would be expected, the northeastern sections of the country had the largest sales for snowblowers. —LGM

First-time vs. replacement buyers

Without a doubt, experienced buyers—those replacing a product—clearly are paying more for that item, typically upgrading the product and features.

Product	First-time buyer	Replacement buyer	% Change
Walk-behind	$ 193	$ 232	20%
Rider	1,072	1,205	12
Lawn tractor	1,118	1,354	21
Garden tractor	1,052	2,799	51
Snowblower	331	432	30
Tiller	392	499	27

Source: 1988 OPEI retail sales report

The OPEI Retail Sales Program is conducted via telephone by contacting more than 5,000 randomly selected U.S. households each week to ask if a particular product has been purchased in the past three-12 months.

The results of this program were presented by George Griffin, vice president, Industrial Marketing Research, during OPEI's annual meeting in Napa Valley, Calif. Griffin also presented analyses of the program at the International Lawn, Garden & Power Equipment Expo in Louisville, Ky., as part of his "Using Information About OPE Customers to Increase Your Profits—An Industry Report" seminar.

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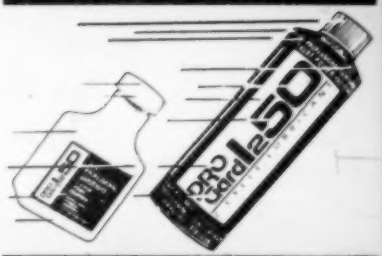

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